# Application/Redetermination for Elderly and Disabled Programs Alabama Medicaid Agency

**Important:** Answer all questions on this form. **An original signature in ink is required**. You may have someone help you complete the application. If additional space is needed, please provide information on the "notes" page at the end of the application. Anyone who makes or causes to be made a false statement, misrepresentation or omission of a material fact in an application or for use in determining eligibility for Medicaid, commits a crime punishable under federal or state law or both.

Please print using dark ink. 1. I want to apply for Medicaid in the: (Check one) Name and Address of Hospital \_\_\_\_\_ (Date of Admission) **☐** Nursing Home Name and Address of Nursing Home (Date of Admission) Name and Address of Intermediate Care Facility for the Mentally Retarded \_\_ ☐ ICF/MR Program (Date of Admission) ☐ Home and Community Based Waiver Program SSI Related Programs (Retroactive, DAC, Widow/Widower, Continuous and Grandfathered Children) 2. Applicant: District Office Use Only Name: Middle/Maiden First Last Home Address: Street or 911 Address (Note: If you are now in a nursing home, your home address prior to admission to the nursing home should be given here.) District Office Stamp State Zip Code City Medicare Number County of Residence: Telephone Number, include Area Code: Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_ Medicaid Number 3. Race: ☐ White ☐ Black ☐ American Indian ☐ Hispanic ☐ Asian ☐ Other\_\_ 4. Sex: ☐ Female ☐ Male 5. Marital Status (Marriage Information): ☐ I am Married \_\_\_\_\_\_(Date Married) ☐ I am Divorced (Date Divorced) ☐ I am Single (Never Married) ☐ I am Separated \_\_\_\_\_ (Date Separated) ☐ I am Widowed \_\_\_\_\_ (Date Widowed) **6. Sponsor:** (If the applicant is unable to complete the application or provide additional information, the Medicaid sponsor should be the person **most** familiar with the financial situation of the applicant and should complete page 10.) Relationship: \_\_\_\_\_ Home Phone: Address: \_\_\_\_ Office Phone: City State Zip Form 204/205 (Revised 03/2008) Alabama Medicaid Agency

<b>7. Spouse Identification</b> (must be completed if you are married or separated):	11. Residency Information:  Are you a United States Citizen? ☐ Yes ☐ No  If not, when did you enter the United States?
Name (First, Middle, Last)	How long have you lived in Alabama?
Address (Street or Box Number)	Do you plan to remain in Alabama? ☐ Yes ☐ No Where were you living prior to entering the medical institution
(City, State, Zip Code)	that you are now in?
Telephone Number (Area Code & Number	City County State
Date of Birth Social Security Number	12. Veteran's Status:  Are you a Veteran? ☐ Yes ☐ No
8. Former Spouse Identification (must be completed if you are widowed or divorced) (For all previous marriages, list most recent first.):  1. Former Spouse's Name:  Social Security Number	Are you a dependent of a veteran? Yes No  If yes to either of the above, complete the following:  Relationship to Veteran  Veteran's Name:
Date Marriage Began Ended	First Middle Last
Reason: ☐ Death ☐ Divorce ☐ Other  2. Former Spouse's Name:	Claim Number
Social Security Number	Have you applied for Veteran's benefits under the new Veterans & Survivor's Improvement Act? ☐ Yes ☐ No If no, you must apply and send verification.
Date Marriage Began Ended Reason: ☐ Death ☐ Divorce ☐ Other	13. Supplemental Security Income (SSI):
9. Living Arrangements: Check the item which describes your current living arrangement.	Have you ever applied for or received SSI?  Yes  No If yes, when?  (month/year)  14. Medical Information:
<ul><li>☐ In your own home with husband or wife (A)</li><li>☐ In your own home alone (A)</li></ul>	Did you have medical expenses in any of the three (3) months prior to application?   Yes  No
<ul> <li>☐ In your parent's household (C)</li> <li>☐ In a rented house, apartment, or room (A)</li> <li>Amount of Rent \$</li></ul>	15. Legal Status: Has the applicant appointed a power of attorney or has a guardian or conservator been appointed?  Yes No If yes, provide a copy and complete the following:  Name  Address  City, State, Zip Code
10. Family Size:  List names of anyone, excluding your spouse, living in your hon Name  Age Relations	ship Income Source Monthly Amount

## 16. Gross Unearned Income

**Gross Income:** (This means "money coming in" before anything is taken out). Answer the following. Do you or your spouse have "money coming in" from any of the sources listed below? ☐ Yes ☐ No
If yes, fill in the claim number and gross amount. (A copy of most recent check stub or other verification must be provided.)

NOTE: If you are applying on behalf of a child, each parent **must** also answer these questions.

NOTE: If you are applying on behalf of an <u>adult</u>, the spouse **must** also answer these questions.

	ir or an <u>addit</u> , the spe	Applicant	Spouse (or Parent)	Other (or Parent)	How Often Received?
Type of Income		Gross	Gross	Gross	(Quarterly,
	Claim Number	Amount	Amount	Amount	Annually, etc.)
Social Security					
(include Medicare Premiums)					
2. SSI (Gold Check)					
3. Public Assistance (Welfare)					
4. Railroad Retirement					
5. Veterans Benefits, Pensions,					
Compensation or Insurance					
6. Federal Civil Service Annuity					
7. State Retirement/Pension					
8. Private Pension					
9. Miner's Benefits					
10. Black Lung Benefits					
11. Cash Contributions (from					
relatives, friends, others)					
12. Rental (land, buildings, or					
from roomer)					
13. Personal loans (relatives,					
friends, others)					
14. Unemployment Compensation					
15. Insurance Annuity or Proceeds					
16. Government Payments					
on land					
17. Coal, Oil, Gravel Rights and					
Timber Leases					
18. Royalties					
19. Court Ordered Support					
20. Interest on Savings					
21. Other: Specify					
22. Other: Specify					
23. Legal Settlements					
24. Sheltered Workshop Earnings					
25. Earned Income (See page 4)					
26. Self Employment (See page 4)					
27. Dividends					

17. Gross Earned Inc	ome (25)		
<b>Gross Income:</b> (This mean applicant should list the income)		anything is taken out) Both applicant AN	<b>D</b> spouse and parents of a child
	use now receive wages or have s, etc.) in the past year, please c	received any wages from earned income check:   Yes   No	or self-employment (such as
If yes, list total wages (before	ore anything was taken out of y	your wages) for the past three months.	
First Month Second Month Third Month	Applicant		Other (or Parent)
18. Self-Employment*	: (26)		
	ent currently self-employed? I	☐ Yes ☐ No own business, farming, etc.)?	
*A copy of last year's	federal tax return must b	e provided (including Schedule "C	<u>" and/or "F").</u>
19. Property			
Please complete all of the i		y you or your spouse own, or have owned	d in the past, or in which you or
		operty or do you have any interest (includes, including your home?   Yes   No	
If yes, Where is the proper	ty located? (List the full addre	ess of the property, include city, county a	nd state:
•	v? (Relative, spouse, renter, etconship to the applicant?	c.)	
		d to return home?   Yes   No	
Have you or your spouse, in any other property?		d any interest (including life estate, heir	property, joint ownership, etc.)
If yes, Where was the prop When did you sign a deed	perty located? County:d disposing of this property?	State:	
		in the past 5 years, a copy of the	
If yes, Send ownership (title		No iler is located?	
, ,			

	. Liquid Assets counts (including checking, savings, certificate	te of der	oosit, IRAs):	
	bes applicant, spouse or parent's name now appear on an			□ No
	s applicant, spouse or parent's name appeared on a bank		· —	<del></del>
	bes applicant, spouse or parent's name now appear on a s		•	• — —
	s applicant, spouse or parent's name appeared on a safe	•		
If y	yes to any of the above questions, complete the following	ıg:	•	, – –
1.	Name and address of Bank, Credit Union or Brokera	ge Firm: _		
	Names on account:	_		
	Account Number:			
	If closed, what was date closed?			urrent balance?
2.	Name and address of Bank, Credit Union or Brokera	_		
	Names on account:			
	Account Number:			
	If closed, what was date closed?		ii open, what is cu	irrent balance? \$
3.	Name and address of Bank, Credit Union or Brokera	_		
	Names on account:Account Number:			
	If closed, what was date closed?		• •	urrent balance? \$
4.	Name and address of Bank, Credit Union or Brokerag	_		
	Names on account:			
	Account Number:			
Œ	If closed, what was date closed?		•	rrent balance? \$
	ank statements and/or cancelled or imaged checks may you (either alone, with your spouse, or with any other p	_		
1.	An annuity or similar financial instrument: (Please describe separately under "Remarks"		Applicant	Spouse
	and provide current market value.)	\$		
2.	Stocks and bonds (Please list separately under			
	"Remarks" and provide current market value			
	for each. Copies required). Enter total value here:	\$		
3.	Patient account in institution			
4.	Cash not in bank	\$		
5.	Trust or special funds	\$		
6.	Money owed to you (including mortgages and notes in which you have an interest). List			
	persons and amounts in "Remarks."			
7.	U.S. Government Savings Bonds (Copies required)	\$		\$
Re	emarks:			

	Liquid Assets (contir	nued)			
	-	ases, mineral rights, timber	A	pplicant	Spouse
	rights or other rights to				
	Please list separately un Enter total value here:	der Remarks below.)	¢		•
	Other (Give details under	r "Remarks")			\$ \$
<i>)</i> . (	Strict (Give details under	r Kemarks )	Ψ		Ψ
Ren	narks:				
Perso Perso furnit Pleas	sonal Property: onal property consists of ture, antiques, and collec	f things you own that are not ctions, are examples of perso g sections and include your o	real property or	liquid assets. Cars,	boats, tools, and equipment, if you sold it now.
<b>1.</b> <i>A</i>	An Automobile? 🔲 Ye	es 🗆 No			
	Make	Model	Value	How is it used	? How much do you owe?
	_		¢		
ä	a		\$		
ł	o		\$		
	Type of Equipment			es □ No Value	How much do you owe?
ò	a			Φ	\$
t	o			\$	\$
I	Professional appraisal n	ty (such as antiques, hobby nay be required.			\$
Has			· •		e, boat or other resource to or an annuity)?   Yes   No
Ite	m Sold or ven Away	Person to Whom it was Sold or Given		ate Given or Sold	Amount Received or Given
l	ven mvay				
	, chi ii way				
1	, chi ri way				
1	, chi ri way				
	, chi ri way				
1	, carrivaly				

22. Buria	l or Life Insurance		
Do you or y	our spouse have any life insura	nnce policies?   Yes	No (If yes, copy of face value page required.)
If yes, 1.	Name of Company		
	Address (if known)		
	Policy Number	·	
	Person insured  Applicant	☐ Spouse	Death Benefit/Face Value of Policy \$
2.	Name of Company		
	Policy Number		
	Person insured  Applicant	☐ Spouse	Death Benefit/Face Value of Policy \$
3.	= =	=	·
	Policy Number		
	Person insured ☐ Applicant		Death Benefit/Face Value of Policy \$
4.	= =	=	
	Policy Number		
•	Person insured ☐ Applicant		Death Benefit/Face Value of Policy \$
	Telson moures 🗀 Tippireum	Бро <b>ш</b> ье	2 cam 2 caca ; and car i care, \$
Do you or y	our spouse have any burial/vau	ılt insurance policies? 🔲	Yes ☐ No
(If yes, copy	of face value page required.)		_
•	= :		
	Policy Number		
	Person insured ☐ Applicant		Death Benefit/Face Value of Policy \$
2.		=	
	= -		
	Policy Number		
•	Person insured  Applicant		Death Benefit/Face Value of Policy \$
3.	Name of Company	_ •	•
J.	Address (if known)		
	Policy Number		
•	Person insured  Applicant		Death Benefit/Face Value of Policy \$
	reison insured [ Applicant	□ Spouse	Death Benefit Face value of Folicy \$

23. Medical Insurance	
Do you have Medicare (Social Security Health Insurance)?	Yes □ No
If yes, what is your Medicare Number?	
Are you enrolled in a Medicare Part D drug plan to cover the cost If yes, how much do you pay for the drug plan premium each m What is the name of the drug plan you are enrolled in?	onth?
what is the name of the drug plan you are emoned in.	
Do you have Long Term Care Insurance?	Name of Company
Type of Policy	Type of Policy
Policy Number	Policy Number
Who pays the health insurance premium?   Yourself	Other
How much is the premium?	How much is the premium?
How often do you pay?	How often do you pay?
To keep money to pay your health insurance premium and that you paid it with your money.	ns, you must provide proof of the premium amount
Amount \$  Do you or your spouse have anything else to pay burial expense if yes, what?	s? (For example, savings account, cash, CD, etc.)   Yes  No
	otes
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#### RELEASE OF INFORMATION

\* I hereby authorize and give my consent for the Alabama Medicaid Agency to obtain information from any source for the purpose of determining my eligibility for Medicaid benefits. I authorize this release form to be in effect for as long as I am on Medicaid regardless of the date that it is signed. I further authorize copies of this document to be used in place of the original. I give my consent for the release of information for those purposes directly related to the administration of the Medicaid program. These purposes include, but are not limited to, establishing eligibility for benefits, determination of the amount of medical assistance received, the provision of services, and investigation of program violations.

#### **AFFIRMATION AND AGREEMENT**

- \* I understand that as a condition of receiving state medical assistance I shall disclose a description of any interest I or my spouse have in an annuity (or similar financial instrument), regardless of whether the annuity is irrevocable or is treated as an asset.
- \* I understand that as a condition of receiving state medical assistance the Alabama Medicaid Agency will become a remainder beneficiary on any annuity that I or my spouse purchased or on which we performed certain transactions on or after February 8, 2006.
- \* I certify under penalty of perjury that I am a citizen or national of the United States, or in satisfactory immigration status.
- \* I give permission to the Alabama Medicaid Agency to use my social security number to get information about my resources and income from banks, financial institutions, employers, and other county, state and federal agencies, and/or to see if I qualify for assistance or to see if I have insurance.
- \* I understand that if this application or other information shows that I may be eligible for payments or benefits from other sources, I am required to apply for them.
- \* I understand that if I am awarded nursing home benefits that part or all of my income must be applied to the nursing home bill as directed by the Alabama Medicaid Agency.
- \* I understand that my case is subject to review by State and Federal Quality Control and that I must cooperate in completing the application process or in any subsequent reviews of my eligibility, including reviews resulting from reported changes, recertification, or as a part of a State or Federal Quality Control Review.
- \* If I am approved for Medicaid, I assign all insurance and medical support benefits to Medicaid. If Medicaid pays my bills, then my insurance or other benefits (such as lawsuit settlements) must be used to pay Medicaid back. I agree to help and cooperate with Medicaid in identifying and collecting this money, or I may lose my Medicaid benefits. I give permission for my insurance company, employer, and others to give needed information to Medicaid in order to administer the Medicaid program.
- \* I understand that resources that have been sold, transferred, disposed of, or given away within the past 36 months (60 months for transfers to trusts) from the month of application, may affect eligibility for Medicaid in a medical institution or a Home and Community Based Waiver Program.

#### RESPONSIBILITIES

\* I agree to notify the Medicaid District Office within ten (10) days, if there is a change in my address, living arrangements, family size, income or resources. I agree to notify the district office if I return to work, am discharged from the nursing home, hospital or move from one to the other. I also agree to report any improvement in my medical condition if I am receiving Medicaid benefits because I am blind or disabled and I am not yet 65 years of age.

#### ESTATE RECOVERY

\* I understand that my estate may be subject to recovery of any funds expended by Medicaid pursuant to this application and/or redetermination. My sponsor, relative, or other person who files my estate <u>MUST</u> notify Alabama Medicaid at ATTN: Estate Administration, P.O. Box 5624, Montgomery, Alabama 36103-5624.

#### FALSE STATEMENTS

\* I know that anyone who makes or causes to be made a false statement, misrepresentation or omission of a material fact in an application or for use in determining eligibility for Medicaid commits a crime punishable under Federal or State law or both.

I affirm under penalty of perjury that all information I give in this document or in support of it is true.

Does the applicant and/or sponsor/repres Responsibilities, Estate Recovery, and Fa Yes No	-	,	g ,	
Signature of Applicant	Date	Signature of Spouse	Date	
Signature of Parent or Sponsor	Date			
Witness' Signature (Witnesses are required only if the appli	Date cant signs with an "X")	Witness' Signature	Date Page 9	

APPOINTMENT OF RI	EPRESENTATIVE		
Title XIX of the Social Secur representative on my behalf. Medicaid matters involving r accepting and giving notice i presenting and eliciting evide	act in my stead and on my behalf rity Act from the Alabama Medicai	id Agency, hereby ratifying said representative to fully making applications, reappriminations and Fair Hearin in full force and effect	ngs, requesting information, and
Done this the	day of		, 20
		WITNESSES:	
(Signature of Medicaid Clair	nant)		
(Social Security Number)			
	er name but can make a mark; this xample: X (Her mark) Jan		by two adults.
representative must answer the What is your relation	er name or make a mark and there he questions below: onship to claimant?		
•	•		
for Medicaid purposes, claim of the form only and attach to	•	required. Representative	of attorney who will represent him/her should sign the Representative portion imant's behalf (Letter of
ACCEPTANCE OF APPOI	INTMENT		
Alabama Medicaid Agency at representations and application penalties for perjury and that	g appointment. I certify that I have nd am not otherwise disqualified from made by me on behalf of the cla false statements may subject me to e is	om acting as an appointed imant are made under an a penalties or fraud.	representative. I acknowledge that ffirmation which subjects me to
	day of		
		WITNESSES:	
(Signature of Sponsor/Repres	sentative)		
(Address)			
(City, State)			
(Telephone Number)			

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### **Notice to Applicants and Sponsors**

Federal and state laws provide both criminal and civil penalties for false statements or material omissions in an application for Medicaid benefits or payments. Also, any application found to contain material misstatements or omissions will be denied.

The following statutes are excerpts from the Code of Alabama pertaining to the Medicaid program:

- § 22-1-11. Making false statement or representation of material fact in claim or application for payments on medical benefits from medicaid agency generally; kickbacks, bribes, etc.; exceptions; multiple offenses.
- (a) Any person who, with intent to defraud or deceive, makes, or causes to be made or assists in the preparation of any false statement representation or omission of a material fact in any claim or application for any payment, regardless of amount, from the medicaid agency, knowing the same to be false; or with intent to defraud or deceive, makes, or causes to be made, or assists in the preparation of any false statement, representation or omission of a material fact in any claim or application for medical benefits from the medicaid agency, knowing the same to be false; shall be guilty of a felony and upon conviction thereof shall be fined not more than \$10,000.00 or imprisoned for not less than one nor more than five years, or both.

\* \* \*

- (e) Any two or more offenses in violation of this section may be charged in the same indictment in separate counts for each offense and such offense shall be tried together, with separate sentences being imposed for each offense of which defendant is found guilty. (Acts 1980, No. 80-539, p. 837, Sections 1-5.)
- \$ 22-6-8, Revocation of eligibility of recipient upon determination of abuse, fraud, or misuse of benefits; when eligibility may be restored.
- (a) Upon determination by a utilization review committee of the designated state medicaid agency that a medicaid recipient has abused, defrauded, or misused the benefits of the program said recipient shall immediately become ineligible for medicaid benefits.
- (b) Medicaid recipients whose eligibility has been revoked due to abuse, fraud or other deliberate misuse of the program shall not be deemed eligible for future medicaid services for a period of not less than one year and until full restitution has been made to the designated state medicaid agency.
- (c) The provisions of this section shall not be effective if they are found by a court of competent jurisdiction to contravene federal laws or federal regulations applicable to the medicaid program. (Acts 1980, No. 80-127, p.190.)

# **Medicaid District Offices**

Address	Telephone Number	<b>Counties served</b>		
Auburn-Opelika District Office 1716 Catherine Court, Suite 1-A Auburn, AL 36830-9938	1-800-362-1504 334-887-3840 (FAX)	Bullock Chambers Clay Coosa	Lee Macon Randolph	Russell Talladega Tallapoosa
<b>Birmingham District Office</b> 486 Palisades Blvd. Birmingham, AL 35209-5154	1-800-362-1504 205-414-9335 (FAX)	Jefferson	St. Clair	
Decatur District Office 2119 Westmeade Dr. S.W., Suite 1 Decatur, AL 35603-1050	1-800-362-1504 256-353-1799 (FAX)	Cullman Jackson	Madison Morgan	
<b>Dothan District Office</b> 2652 Fortner Street, Suite 4 Dothan, AL 36305-3203	1-800-362-1504 334-794-3741 (FAX)	Barbour Coffee Conecuh Covington	Crenshaw Dale Geneva Henry	Houston Pike
Florence District Office 214 E. College Street Florence, AL 35630-5606	1-800-362-1504 256-740-0228 (FAX)	Colbert Franklin Lauderdale	Lawrence Limestone	Marion Winston
Gadsden District Office 200 West Meighan Blvd., Suite D Gadsden, AL 35901-3200	1-800-362-1504 256-546-4973 (FAX)	Blount Calhoun Cherokee	Cleburne Dekalb Etowah	Marshall
Mobile District Office 3280 Dauphin Street Suite B 100 B Mobile, AL 36606-4049	1-800-362-1504 251-471-6930 (FAX)	Baldwin Escambia	Mobile Washington	
Montgomery District Office 501 Dexter Avenue (P.O. Box 5624, Zip 36103-5624) Montgomery, AL 36104-3744	1-800-362-1504 334-242-3835 (FAX)	Elmore	Montgomery	
Selma District Office 106 Executive Park Lane Selma AL 36701-7734	1-800-362-1504 334-418-0036 (FAX)	Autauga Butler Chilton Choctaw	Clarke Dallas Lowndes Marengo	Monroe Perry Wilcox
Tuscaloosa District Office 907 22 <sup>nd</sup> Avenue Tuscaloosa, AL 35401-5822	1-800-362-1504 205-345-9414 (FAX)	Bibb Fayette Greene Hale	Lamar Pickens Shelby	Sumter Tuscaloosa Walker